

## Creating a Service Request

Go to the AMIS **Service Requests** tab. Select the **Create New Service Request** button and complete the form.

The screenshot shows the 'Service Request Edit' form for creating a new service request. The form is divided into several sections: Service Request Information, Additional Information, Description Information, and Resolution. Callouts provide guidance on specific fields and actions.

**Service Request Edit** (Buttons: Submit, Submit & Add Attachment, Save & New, Cancel)

**Service Request Information**

- Service Request Owner: Tim Tester
- Contact Name: [Empty]
- Organization Name: [Empty]
- Program: --None-- (Callout: Select from dropdown list)
- Program Topic: [Empty]
- Requested By Date: 4/3/2019 [ 3/27/2019 ] (Callout: Date you want it completed)
- Last Comment Date: [Empty]
- Last Attachment Date: [Empty]
- Funding Application: [Empty]
- Award: [Empty]
- Validated: --None-- (Callout: Provide a brief title)

**Additional Information**

- Status: New (Callout: Leave as New)
- Service Request Origin: Web (Callout: Leave as Web)
- Completed Date: [Empty]

**Description Information**

- Subject: [Empty] (Callout: Provide a brief title)
- Description: [Empty] (Callout: Provide a complete description)

**Resolution**

- Resolution: [Empty] (Callout: Send to the CDFI Fund)

(Buttons: Submit, Submit & Add Attachment, Save & New, Cancel)

## Add a Comment or Attach a File to a Service Request

Select the **Add Comment** button or the **Attach File** button from the Service Request Detail page.

The screenshot shows the 'Service Request Detail' page for request 00015043. The page includes fields for owner, number, contact, organization, program, and dates. A blue callout box points to the 'Add Comment' and 'Attach File' buttons, stating: 'For attachments, simply follow the onscreen instructions'.

Service Request Comments Public [0] | Attachments [0]

**Service Request Detail** Clone Edit

Service Request Owner	BEA	Contact Phone
Service Request Number	00015043	Contact Email
Contact Name	<a href="#">Tim Tester</a>	Funding Application
Organization Name	<a href="#">Test Org 1</a>	Award
Program	BEA Program	Validated
Program Topic		
Requested By Date	4/2/2019	
Last Comment Date		
Last Attachment Date		

▼ Additional Information

Status	Assigned	Completed Date
Service Request Origin	Web	
Subject	Test	
Description	Test	

**Attach File to Service Request 00015043**

- Select the File**  
Type the path of the file or click the Browse button to find the file.  
 Browse...
- Click the "Attach File" button.**  
Repeat steps 1 and 2 to attach multiple files.  
( When the upload is complete the file information will appear below. )  
Attach File
- Click the Done button to return to the previous page.**  
( This will cancel an in-progress upload. )  
Done

Clone Edit Add Comment Attach File

**Comments Service Request 00015043**

Service Request Comment Public Edit Save Cancel

Service Request Details

Subject	Test
Description	Test

Comment Details

Comment

Enter your comment and click Save

Save Cancel

## Validate a Service Request

Select the **Edit** button from the Service Request Detail page.

**Service Request 00015032**

<b>Service Request</b>			
Service Request Owner	IT/HD	Contact Phone	
Service Request Number	00015032	Contact Email	<a href="mailto:adrianne.willis@testcon.com">adrianne.willis@testcon.com</a>
Contact Name	<u>Test User 01</u>	Funding Application	
Organization Name	<u>Test Org 2</u>	Award	
Program	BEA Program	Validated	--None-- ▾
Program Topic	Application	<div>Select YES or No</div>	
Requested By Date	3/26/2019		
Last Comment Date	3/20/2019 6:27 PM		
Last Attachment Date	3/20/2019 4:02 PM	<div>Review the resolution before answering</div>	
<b>Additional Information</b>			
Status	Completed ▾		
Completed Date	3/26/2019 10:37 PM	Service Request Origin	Web
Description	The BEA Application is due today and I cannot sign it.	Subject	Signature Problem
<b>Resolution</b>			
Resolution	Talked the user through account problems		
Date/Time Opened	3/20/2019 3:43 PM	Date/Time Closed	
<div>Save Cancel</div>			

If the Service Request has been completed to your satisfaction, select Yes from the dropdown. If you do not agree, select No from the dropdown, and add a comment and/or attachment to explain what has not been completed.

For additional information on Service Requests, please review Section 8 of our training manual, [Getting Started - Navigating AMIS](#)